



# Edward Jones Adopts Broadridge-backed Performance Analytics Platform for Retail Investors

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LAKE SUCCESS, N.Y., Dec. 17, 2015 /PRNewswire/ -- [Broadridge Financial Solutions, Inc.](#) (NYSE: BR) today announced that Edward Jones financial advisors will have access to Broadridge's Performance Analytics platform, delivering a flexible, highly transparent performance reporting and analytics tool for retail investors.

Through Broadridge's Performance Analytics platform, Edward Jones financial advisors can deliver in a highly customized portfolio performance report tailored to individual investors' personal preferences. Broadridge's platform will enable Edward Jones to deliver real-time portfolio analytics and reporting for financial advisors and their clients.

"Through the new Performance Analytics platform, Edward Jones financial advisors and their clients have the ability to access and view details on their investment portfolios' performance according to their individual needs and preferences," said Tom Migneron, principal in Operations at Edward Jones. "We have partnered with Broadridge to develop this premier and highly customizable platform, a critical component of a successful advice model."

The Performance Analytics platform provides reconciled performance reporting from the previous day's market close. Reporting is provided at the household, client, account and securities levels with both time- and dollar-weighted rates of return, and can calculate these analytics for custom time periods as a financial advisor or client requests. Reports are branded and configured by the financial advisor to ensure accurate, detailed and timely information on a client's investments.

"Edward Jones' competitive advantage is creating the ideal client experience, delivering technologies that will aid both financial advisors and their clients," said Traci Mabrey, head of Wealth Solutions, Broadridge Global Technology and Operations.

"As firms move away from a product-centric offering toward a holistic advisory model, financial advisors have a huge opportunity to transition to a holistic goal-based advice model, and focus on investment performance tailored to their clients' financial goals."

## About Broadridge

Broadridge Financial Solutions, Inc. (NYSE: BR) is the leading provider of investor communications and technology-driven solutions for broker-dealers, banks, mutual funds and corporate issuers globally. Broadridge's investor communications, securities processing and managed services solutions help clients reduce their capital investments in operations infrastructure, allowing them to increase their focus on core business activities. With over 50 years of experience, Broadridge's infrastructure underpins proxy voting services for over 90% of public companies and mutual funds in North America, and processes on average \$5 trillion in equity and fixed income trades per day. Broadridge employs approximately 7,400 full-time associates in 14 countries. For more information about Broadridge, please visit [www.broadridge.com](http://www.broadridge.com).

## About Edward Jones

Edward Jones, a FORTUNE 500 firm, provides financial services for individual investors in the United States and, through its affiliate, in Canada. Every aspect of the firm's business, from the types of investment options offered to the location of branch offices, is designed to cater to individual investors in the communities in which they live and work. The firm's 13,000-plus financial advisors work directly with nearly 7 million clients to understand their personal goals — from college savings to retirement — and create long-term investment solutions that emphasize a well-balanced portfolio and a buy-and-hold strategy. Edward Jones embraces the importance of building long-term, face-to-face relationships with clients, helping them to understand and make sense of the investment options available today.

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